



Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Required Report - public distribution

Date: 8/1/2000

GAIN Report #CO0026

Colombia

Livestock and Products

Annual

2000

Prepared by:

David G. Salmon, Agricultural Attaché
U.S. Embassy, Bogota, Colombia

Drafted by:

Leonardo Pinzón, Agricultural Specialist

Report Highlights: Colombia's *cattle herd* is estimated at 21.7 million head in 2000, 5.2 percent above a year earlier. *Cattle slaughter* is expected to be 652,000 tons of beef (3.8 million head) in 2000, about 4.1 percent higher than last year. *Marketing* efforts helped open the door to market high-quality U.S. beef to the restaurant and hotel sectors in Bogota. Continuing the promotion of Angus cattle in Colombia, Thistle Farms, a breeder of purebred Angus cattle in Ohio, sold 21 bulls in an auction.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
Annual Report
Bogota [CO1], CO

Table of Contents

| | |
|------------------------------------------------------------------------------------|--------------------|
| Executive Summary | 1 |
| Production | 1 |
| 1. Production Factors | 1 |
| 2. USDA-ICA Foot-and-Mouth Disease (FMD) Control Program | 1 |
| Consumption | 2 |
| Trade | 2 |
| 1. Exports | 2 |
| 2. Imports | 2 |
| 1. Export | 4 |
| 2. Imports | 4 |
| Non-tariff Barriers | 4 |
| Tariffs | 4 |
| Marketing | 4 |
| Import Requirements | 5 |
| 1. Import Requirements for Meat - Not Transformed (fresh, chilled or frozen) | 5 |
| 2. Meat - Transformed (fresh, chilled or frozen) | 6 |
| 3. Import Requirements for Cattle | 7 |
| Potential Importers | 9 |
| 1. Beef Cattle | 9 |
| 2. Meat Importers | 11 |
| TABLES | 15 |
| Animal Numbers, Cattle | 15 |
| Meat, Beef and Veal Production, Supply and Demand Table | 16 |
| Cattle Prices | 17 |
| Beef Prices | 18 |
| Cattle Exports, 1998-99 | 19 |
| Cattle Imports, 1998-99 | 20 |
| Beef Exports, 1998-99 | 21 |
| Beef Imports, 1998-99 | 22 |

Executive Summary

The insurgency problem unsolved and the slow recovery of the economy from the deep recession continue having a negative impact on the Colombian cattle industry in 2000. Colombia's **cattle herd** is estimated at 21.7 million head in 2000, 5.2 percent above a year earlier. **Cattle slaughter** is expected to be 652,000 tons of beef (3.8 million head) in 2000, about 4.1 percent higher than last year, with a further three percent projected growth for 2001. Imports of **cattle** amounted to 1,014 head in 1999, one third of the cattle purchased by Colombia in the previous year. Imports of U.S. cattle are forecast to grow ten percent annually as Colombian cattlemen persist in their efforts to improve the genetic base of their cattle industry.

Production

1. Production Factors

Colombia's **cattle herd** is estimated at 21.7 million head in 2000, 5.2 percent above a year earlier. This growth includes a 2.4 upward revision of head inventories in 1999. Beef cattle ranches that are not close to urban areas are discontinuing their operations. For the last decade, cattlemen have been relocating their operations closer to urban areas where security may be better. Ranchers are converting their beef operations into dairy farms and feed lots close to urban centers.

Colombian beef output is subject to production cycles lasting from 4 to 8 years. Current cycle is estimated to last 7 years (1993-2000) with its highest production peak in 1998. Beef output during the past decade increased only 1.6 percent annually. **Cattle slaughter** is expected to be 652,000 tons of beef (3.8 million head) in 2000, about 4.1 percent higher than last year, with a further three percent expected growth for 2001. Increases in Colombia's beef production in the next 3-5 years depends on an optimistic picture of beef consumption recovery along with the economy.

2. USDA-ICA Foot-and-Mouth Disease (FMD) Control Program

In 1973, the United States and Colombia signed an agreement to control and eradicate FMD in northwest Colombia near the Colombian-Panamanian border (Uraba area). The program is administered by the Colombian Agriculture Institute (ICA) on the Colombian side and by USDA's Animal Plant Health Inspection Service (APHIS) on the U.S. side. The Uraba area, with about 500,000 head, was certified in mid-1997 to be free of FMD by the Office of International Epizootics in Paris.

This program has been extended to all of Colombia. In Colombia's Atlantic coast (northern coast) 96 percent of the cattle were vaccinated against FMD in 1999, and the GOC expects to have it declared free of FMD by the end of 2000, encompassing a herd of about ten million head. However, to meet U.S. standards the area would have to be closed to the entrance of cattle coming from the rest of Colombia. In fact, the Colombian Agriculture Institute (ICA) on December 1999 issued Resolution 02586 stating severe controls to the entrance of cattle coming from endemic zones. It was settled a boundary protection region around the free vaccination zone, which GOC want to be certified free of FMD by the Office of International Epizootics in Paris this year. Colombia expects to expand this free zone to the entire country by 2005. Also, Colombia signed agreements

with Ecuador and Venezuela in 1997 to control FMD in the three countries in a coordinated way.

Colombia hopes that the acceptance of FMD free zones by the United States will spur exports of both beef and live animals. These increased sales will be directed to both the U.S. market and other countries which are likely to adopt U.S. import standards. Any increase in exports, however, is contingent upon an improvement in rural security which is essential to allow growth in production through the adoption of better management practices.

Consumption

Consumption of **beef** in 2000 is expected to amount to 669,000 tons, up 2.6 percent from 1999 after a 3 percent decline a year earlier. Consumption is being constrained by a reduced purchasing power of the Colombian consumer and a tendency for consumers to prefer poultry meat. In recent years, Colombia's meat consumption trends have shifted away from beef due to lower poultry prices and a growing perception that red meat is less healthy than other meat alternatives.

Cattle prices showed an eight percent rise in the period July 1999-July 2000 showing a change in price growth trend. Consumer **beef prices** increased 7 percent by July 2000, encompassing the live cattle price growth. In July 2000, live weight cattle prices stand at 1,782 pesos per kilo (\$0.83/lb), up eight percent from a year ago. Also in July, the retail price for an average cut of beef (loin roast) stands at 10,444 pesos per kilo (\$4.90/lb), 7 percent above a year earlier.

Trade

1. Exports

Cattle price differentials between Venezuela, Ecuador and Colombia result in a flow of cattle between these countries. In 1999, 6,391 head of cattle crossed over the border to Venezuela, down 133,000 from previous year, because of the ban to import cattle from Colombia imposed by the Government of Venezuela.

Because of the food-and-mouth disease present in Colombia, its export market for cattle and beef is restricted to those countries which also have this disease. In the past, Colombia was a net exporter of **beef**. In recent years, however, beef exports have dropped precipitously from a record 23,770 tons in 1991 to only 1,559 tons (\$3 million) in 1999. Beef exports in both 2000 and 2001 are estimated at 2,200 and 3,100 tons, respectively.

Dutch Antilles and Aruba are relatively constant buyers of Colombian Meat exports with about 1,000 tons each year. Venezuela is the main buyer of Colombian beef, but sales to this country vary sharply. Beef exports are not projected to grow significantly over the remainder of the decade as Colombian prices for both live animals and beef usually are not competitive in world markets.

Beef and cattle exports do not receive an export subsidy.

2. Imports

Imports of **cattle** amounted to 1,014 head in 1999, one third of the cattle purchased by Colombia in the previous year. About two third of the cattle bought in 1999 came from USA. From 1995 to 1998, imports of purebred Brahman cattle from Brazil grew as Colombian cattlemen consider it more adapted to the tropical conditions of this country. However, last year imports from Brazil dropped dramatically. In addition to the two types of foot-and-mouth disease (A and O) that Colombia has, in Brazil exists type C. Because of this, the GOC requires an additional quarantine before leaving Brazil.

In 1999, no cattle were imported from Venezuela nor Ecuador. Slaughtered cattle is usually traded with Ecuador and Venezuela, but its quantity is variable.

The United States and Canada are the main sources of purebred cattle. In recent years, imports of U.S. cattle--all purebred--into Colombia have consisted of Brahman (55 percent), Holstein (35 percent), and Jersey, Brown Swiss and Simmental (10 percent). In 1999, 469 head (\$464,000) of cattle were purchased from the United States and 500 head are estimated to be imported in 2000. Imports of U.S. cattle are forecast to grow at about ten percent annually over the next 3-5 years as Colombian cattlemen persist in their efforts to improve the genetic base of their cattle.

Because of a liberalized import policy implemented in 1991, a market for imported **beef offals** has developed. Colombian beef offal imports grew from 852 tons in 1991 to 5,063 tons (\$3.4 million) in 1999. Initially, all offal imports were supplied by the United States, but the Canadian Meat Inspection Service was approved by Colombia in 1996, opening the import doors to that supplier. Because of attractive Canadian prices, Colombian importers shifted much of their buying activity to Canada. Canada's share of the Colombian import market for offals accounted for 16 percent in 1999 while U.S. market share amounted to 61 of total imports. Domestic offal consumption is stimulated by its lower prices compared to beef. U.S. beef offal exports to Colombia are forecast to grow at an annual rate of 3 percent in the near term.

Competition for offals/meat from other Andean Community countries (Venezuela, Ecuador, Peru and Bolivia) is not likely to occur in the near future, as export prices from these countries are similar or higher than those in the Colombian market. However, it should be noticed that imports of offals from Argentina and Chile reached 1,050 tons (around 20 percent of the total imports) in 1999.

Historically, Colombia's **beef** imports have been minimal. Previously imports were destined almost exclusively for the Colombian island of San Andres, a free port located about 500 miles offshore in the Caribbean Sea. However, high domestic prices for beef and trade liberalization policies initiated in 1991 opened the door for beef imports. Beef imports began in 1995 with 1,968 tons (\$1.8 million) and reached 2,850 tons (\$3.3 million) in 1999 after having risen up to 4,000 tons (\$7 million) in 1998. Panama is the main supplier accounting for 40 percent, followed by the United States, 37 percent, and Argentina, 21 percent, of the total imports in 1999.

Despite the high quality of U.S. beef, sales to Colombia are constrained by the relatively high price of the U.S. product. However, a market among exclusive hotels and restaurants is opening and in 1999, Colombia imported 1,048 tons valued at \$1.2 million of high-value beef cuts from the United States. We anticipate an annual sales growth rate of 10 percent over the next several years, as this market continues to expand.

In the last two years, cattle growers have been asking the GOC to establish variable import duties for beef, under the Andean Price Band system, as a means of limiting imports. The Andean Community consists of Colombia, Venezuela, Ecuador, Peru and Bolivia. However, the GOC has been reluctant to take this action since it would

likely result in increased consumer price levels for a sensitive and basic food item.

About 30 percent of the country's beef is marketed in urban supermarkets. The bulk of the remainder is sold through specialized butcher shops. Only one percent of all red meat sold in Colombia is marketed through restaurants. Virtually all beef imported from countries other than the United States is used in the manufacture of sausages. Imported red meat usually is purchased by specialized brokers on behalf of local meat processors. These brokers earn a commission for their services.

Policy

1. Export

Beef and cattle exports do not receive an export subsidy.

2. Imports

Non-tariff Barriers: Colombia generally requires certification of each foreign meat processing plant that seeks to export to Colombia. Canada and the United States are exceptions to this rule as the GOC has accepted the plant inspection system implemented by those countries. For these two countries, Ministry of Agriculture officials visit a sample of plants and then authorizes all plants operating under the host countries inspection system to export to Colombia (ICA resolution 2235/95). In the case of the United States, export approval was valid for two years which expired in October 1999. Currently, ICA (the GOC's equivalent to FSIS) has extended the validity period until a new methodology is adopted to certify U.S. exporting plants.

No other significant non-tariff barriers are applicable to the imports of U.S. livestock and its products.

Tariffs: Purebred dairy and beef cattle are assessed an import duty of 5 percent. Cattle imported for bullfights and slaughter are assessed an import duty of 10 percent. In general, all red meat is assessed an import duty of 20 percent. These products, when traded between Andean Community countries, are exempt from import duties.

Under an export promotion scheme--*Plan Vallejo*-- imported products destined for use in the manufacture of goods which will be exported later (excluding Andean Community countries) are eligible for entry into Colombia free of duties and taxes.

Marketing

Despite vexing problems in Colombia's livestock sector, there is a demand for imported purebred Holstein and Brahman, and to a lesser extent for Jersey, Brown Swiss, Angus, and Simmental.

In April 1998, this office and the U.S. Meat Export Federation organized visits and escorted a team of American meat exporters to promote U.S. meats in Colombia. Other market development activities have taken place in

order to maintain the image of U.S. meat among Colombian consumers.

The Office of the Agricultural Attache has actively promoted Angus cattle in Colombia in the last three years. Twenty-two young Angus bulls were imported in 1997 and exhibited by our Office at the National Agricultural Fair in Palmira. Weight gain of these animals has been tracked and in August 1998 they were sold to cattlemen and coffee producers with the support of our Office. Continuing the promotion of Angus cattle in Colombia, Thistle Farms, a breeder of purebred Angus cattle in Ohio, held an auction of purebred bulls in the heart of Colombian coffee country near the city Manizales on March 25, 2000. A total of 21 bulls, which had been previously imported and had cleared quarantine, were sold at the auction. The Angus breed is not well known in Colombia but offers good sales potential for U.S. exporters.

Also, the Agricultural Affairs Office Bogota helped open the door to Colombia for Hospitality Brokers International in its initial attempt to market high-quality U.S. beef to the restaurant and hotel sectors in Bogota. The lack of a reliable supplier of U.S. beef has forced several high-end restaurants and hotels in Bogota to take prime rib off their menus. Post arranged two formal presentations over two days to 35 key food service representatives in the elegant setting of the Casa Medina Hotel and firm interest was expressed by several companies in importing the products, especially prime rib and high-quality steaks. A reputable local broker will take orders and will import mixed containers of U.S. beef and beef products.

Import Requirements

1. Import Requirements for Meat - Not Transformed (fresh, chilled or frozen)

A transformed product is defined by the GOC as having been subjected to processing that resulted in a change in its internal structure.

1. The Colombian importer must register his company with the Ministry of Foreign Trade. This grants Government of Colombia authorization to the company to import any and all agricultural products.
2. The importer purchases an import registration form at the Ministry of Foreign Trade (cost 21,500 pesos or about \$10).
3. The importer presents to ICA his completed import registration form and is issued a sanitary permit (cost 20,000 pesos or about \$9). This process normally takes about 48 hours.
4. The importer presents the completed import registration form and the ICA sanitary permit to the Ministry of Foreign Trade. The Ministry of Foreign Trade will then issue an import registration approval. This process normally takes 48 hours.
5. The imported meat product is inspected by an ICA veterinarian upon arrival in Colombia. The ICA official ensures that the product comes from U.S. inspected production facilities, is free of disease, has been inspected by USDA prior to its shipment and is accompanied by a USDA health certificate.
6. If the meat is sold in retail packages, it must be labeled. Labels must be in Spanish and contain the product name, name and address of importer, name and address of producer, net contents in metric units, list of ingredients, Ministry of Health registration number, recommended method of storage, and product expiration date. This information may be provided by the application of a sticker to the package.
7. All meats are assessed a 20 percent import duty. Poultry meat and pork are also subject to a variable duty under the price band system. Currently, total import duties stand at 185 percent for poultry meat,

and 20 percent for pork.

8. Note: Registration of product with the Ministry of Health (INVIMA) is not required for non-transformed food products.

2. Meat - Transformed (fresh, chilled or frozen)

1. The Colombian importer must register his company with the Ministry of Foreign Trade. This grants Government of Colombia authorization to the company to import all agricultural products.
2. The product must be registered with INVIMA, the National Institute for the Surveyance of Food and Medicines. This registration can be done by either the exporter or the importer. INVIMA registration requires: (a) a written document from the manufacturer stating that they manufacture the listed products, and (b) a certificate of free sale stating that the products are approved for human consumption in the United States. This certificate needs to be issued by a U.S. Government (state, local or federal) health authority.

Although not required, INVIMA registration is facilitated if a description of the manufacturing process and a list of ingredients, including any additives, preservatives, and colorings is submitted.

All documents must be notarized by the Colombian Embassy or a Consulate in the United States and by the Ministry of Foreign Affairs in Bogota. These documents must be translated into Spanish by a translator approved by the Ministry of Foreign Affairs. A sample label also may be submitted. An INVIMA registration fee must be paid. This fee covers the cost of preparing an analysis of the product. The product does not need to be analyzed before registration approval is given. Costs depend on the item, but range from \$511 to \$882 per product. After all the required documentation is submitted, product registration by INVIMA takes about three working days.

INVIMA registration is valid only for the applicant (exporter or importer) and the manufacturer specified in it. Whenever the U.S. exporter wants to change its Colombian importer, there are two possibilities:

(a) If the U.S. exporter is the applicant for INVIMA registration, he must submit an application for modification to INVIMA (cost 60,000 pesos or about \$28).

(b) If the Colombian importer is the applicant, the U.S. exporter must initiate a new registration process, specifying his new importer(s). Afterwards, he may change his importer(s) whenever he deems it advisable. The U.S. exporter must apply through his legal representative in Colombia or a lawyer.

3. The importer purchases an import registration form at the Ministry of Foreign Trade (cost 21,500 pesos or about \$10).
4. The importer presents the completed Ministry of Foreign Trade form to INVIMA for clearance. This process normally takes about 48 hours.
5. The importer presents the completed Ministry of Foreign Trade form and INVIMA clearance to ICA (cost 20,000 pesos or about \$9). ICA then issues a sanitary permit. This process normally takes about 48 hours.
6. The importer presents the completed Ministry of Foreign Trade form, INVIMA clearance and ICA sanitary permit to the Ministry of Foreign Trade. The Ministry of Foreign Trade will then issue an

import registration approval. This process normally takes about 48 hours.

7. If the meat is sold in retail packages, it must be labeled. Labels must be in Spanish and contain the product name, name and address of importer, name and address of producer, net contents in metric units, list of ingredients, Ministry of Health registration number, recommended method of storage, and product expiration date. This information may be provided by the application of a sticker to the package.
8. Transformed beef and pork are assessed a 20 percent import duty.
9. Note: the Ministry of Agriculture must approve chicken, or other poultry, part imports. Whenever this Ministry determines that domestic supplies are available to meet local demand and/or that imports of this product would economically damage local poultry industry, imports are not approved. Imports of chicken parts which undergo minimal processing, such as those sprinkled with paprika, are not allowed.

3. Import Requirements for Cattle

1. The Colombian importer must register his company with the Ministry of Foreign Trade. This grants Government of Colombia authorization to the company to import all agricultural products.
2. The importer purchases an import registration form at the Ministry of Foreign Trade (cost 21,500 pesos or about \$10).
3. The importer presents to ICA his completed import registration form and is issued a sanitary permit (cost 20,000 pesos or about \$9). This process normally takes about 48 hours.
4. The importer presents the completed import registration form and the ICA sanitary permit to the Ministry of Foreign Trade. The Ministry of Foreign Trade will then issue an import registration approval. This process normally takes 48 hours.
5. The exporter in the United States must obtain a USDA health certificate, which states the following:
 - a. The United States is free of foot-and-mouth disease, contagious bovine pleuropneumonia, and rinderpest.
 - b. Cattle originated from premises where no clinical diagnosis of bovine leucopsis, campylobacteriosis, trichomoniasis, infectious bovine rhinotracheitis (IBR), parainfluenza (PI3), bovine virus diarrhea (BVD), paratuberculosis, brucellosis, coital exanthema, malignant catarrhal fever, Aujeszky's disease, bluetongue, and Q fever has been made in the 12 months prior to this exportation.
 - c. Cattle were treated twice during the 30 days prior to exportation for the removal of internal and external parasites.
 - d. Cattle were isolated from all other animals not tested for export from the first day of testing until embarkation.
 - e. Cattle will be transported from the isolation premises to the port of embarkation in cleaned and disinfected vehicles.
 - f. None of the cattle originates from premises under any type of State or Federal quarantine for animal diseases.
6. Animals must test negative for the following diseases within 30 days of embarkation, except tuberculosis, whose negative test is valid for 60 days:

Tuberculosis: intradermal caudal fold test using bovine PPD tuberculin.

Brucellosis: Non-vaccinated animals over 6 months of age shall be negative to the standard plate or the standard tube agglutination test at 1:25 dilution (less than 30 IU/ml). Vaccinated animals under 20 months of age and Non-vaccinated animals under 6 months of age are not required to be tested. Vaccinated females over 20 months of age shall be negative to the standard plate or standard agglutination test at the 1:50 dilution.

Bovine leucopsis: negative to agar gel immunodiffusion (AGID) test.

Leptospirosis: negative to the micro titer agglutination test at 1:100 dilution for *L. icterohaemorrhagiae*, *L. pomona*, *L. canicola*, *L. grippotyphosa*, and *hardjo*.

Paratuberculosis: negative at 1:8 dilution by the complement fixation test or to the intradermal johnin test.

Campylobacteriosis and trichomoniasis: negative to a direct microscopic exam or culture test. No test is required for virgin bulls and heifers, or artificially bred heifers.

Infectious bovine rhinotracheitis (IBR/IPV): negative at a 1:2 dilution by the serum neutralization test.

Bovine virus diarrhea (BVD): negative to a serum neutralization test at a 1:2 dilution.

All laboratory tests must be done by official laboratories. Special tests recommended by the Yearbook of Animal Health of FAO/OIE or any other international animal health organization may be required.

7. Cattle entering Colombia from the United States must have been vaccinated as follows:

Females with reduced dose Brucellosis Strain 19 vaccine according to the nationally accepted U.S. usage standards.

Leptospirosis bacterin or treated with dihydrostreptomycin at a dosage of 25 mg/kg. Vaccination can be substituted for the test requirement. This vaccination must be administered at least 20 days prior to embarkation.

Killed/modified live vaccine for IBR/PI3/BVD. Vaccination can be substituted for the test requirement.

A modified live virus nasal vaccine or killed virus vaccine must be administered at least 20 days before embarkation.

Anthrax, within a time lapse of 1 to 6 month prior to embarkation, if this disease exists in the area of origin.

Animals over 3 months of age, must be vaccinated against blackleg and malignant edema, between 1 and 6 months prior to shipment.

8. Upon arrival in Colombia ICA (Colombian Agricultural Institute) may require that any or all tests conducted in the United States be repeated.
9. Upon arrival in Colombia cattle must be inspected by ICA animal health officials.
10. Purebred dairy and beef cattle are assessed an import duty of 5 percent. Cattle imported for bullfights and slaughter are assessed an import duty of 10 percent.
11. Upon arrival in Colombia cattle must remain in quarantine for 30 days. The importer can arrange to quarantine his cattle on ICA or private premises. The expenses, including the laboratory tests required by ICA, are charged to the importer. (Cattle imported from Brazil, because of the type C of foot-and-mouth disease that Colombia does not have, are subjected to tests that must be negative to this virus kind and to a 30-day quarantine both in Brazil and Colombia.)

Potential Importers

1. Beef Cattle

Eliana Serrano
Executive Director
Asociacion Colombiana De Criadores De Ganado Cebu (Brahman Association)
Transv. 21 No. 95-64
Bogota, Colombia
Tel. (57-1) 610-54-86
FAX: (57-1) 610-8641
E-mail: ade@impsat.net.com

Roberto Escallon Ricaurte
President
Santa Gertrudis Association
Cra. 7 No. 16-56, Of.502
Bogota, Colombia
Tel: (57-1) 283-8212

FADEGAN(Regional Cattlemen's Assoc)
Calle 72 No. 64-155
Medellin, Colombia
Tel. (57-4) 441-6800, 441-6734, 257-0800
FAX: (57-4) 257-0800

Fondo Ganadero de Antioquia
Cra. 43 A No. 11 A 80, P 5
Medellin, Colombia
Tel: (57-4) 266-5010

Fondo Ganadero del Meta
Apartado 2643
Villavicencio, Colombia
Tel: (57-8) 33-402, (57-8) 33-462

Lazaro Escobar
Cra. 15 No. 84-24, Of.305
Bogota, Colombia
Tel: (57-1) 236-3664
Fax: (57-1)236-3689

Fondo Ganadero Del Valle
Ave. 5 CN No. 24-42
Cali, Colombia
Tel: (57-2) 67-8220, (57-2) 68-6323

Fondo Ganadero Tolima
Cra. 4 No.12-71
Ibague, Colombia
Apartado 856
Tel: (57-8) 63-0370, (57-8) 63-2631

Juan Pablo Ortiz, Executive Director
ASOCIACION BRANGUS (Brangus Association)
Calle 11B No. 43A-27, Edif.Los Cedros,
Bloque 1, of.202
Medellin, Colombia
Tel. (57-4)312-3098, (57-4) 311-4379
FX: (57-4)311-4223, (57-4) 312-4223

Luis Lara
Inversiones La Rueda
Ave.El Dorado Cra. 103 Bis
Apdo 018946
Bogota, Colombia
Tel. (57-1) 267-6782

Fondo Ganadero Santander

Calle 37 No. 19-50
Apartado 1025
Bucaramanga, Colombia
Tel: (57-7) 634-1334
Fax: (57-7) 634-0647

Fondo Ganadero Bolivar

Edif. Lequerica
Ave. Luis Carlos Lopez
Apdo. 1630
Cartagena, Colombia
Tel: (57-5) 64-2706

Jorge Visbal, Executive President
FEDEGAN (Natl. Cattlemen's Assoc.)
Ave. Caracas No. 36-65
Bogota, Colombia
Tel: (57-1) 232-7129
FAX: (57-1) 232-7153
<http://www.fedegan.org.co>

Jaime Arenas Bonilla

Transversal 33 No. 119-31
Bogota, Colombia
Tel: (57-1) 213-9714

Asociacion Santa Gertrudis

Cra. 7 No.16-56, Of 502
Bogota, Colombia
Tel: (57-1) 283-8212

Alvaro Arevalo V, Gerente
Ganaderia Albania
Cra. 5 No. 26 A-47 Torre C Apt. 911
Bogota, Colombia
Tel: (57-1) 267-5800

Fondo Ganadero Cauca

Calle 18 Norte 6-88
Popayan, Colombia
Tel: (57-2) 32-138, (57-2) 34-356

Fondo Ganadero Atlantico

Calle 39 No. 41-45
Barranquilla, Colombia
Tel: (57-5) 31-5106, (57-5) 31-5432

Luis Felipe Garnica
Director Executive
Asociacion de Ganado Simmental
Cra. 8 No. 15-49, of. 1003
Bogota, Colombia
Tel. (57-1) 341-9801
Telefax: (57-1) 523-3832
E-mail: bgarrido@icfes.gov.co

Jose Isnardo Garzon, Gerente
Frigorifico Guadalupe
Carretera del Sur No. 66-78
Bogota, Colombia
Tel: (57-1) 270-0700 (57-1) 247-5338

Federacion de Ganaderos de los Llanos

Calle 65 No.13-50, of. 501
Bogota, Colombia
Tel: (57-1) 255-7405

Camilo J. Saenz, President
Hacienda Santa Ana
Tel: (57-1) 236-0247
Bogota

Fondo Ganadero de Cundinamarca

Diag. 45 No. 16B-37
Apartado 7657
Bogota, Colombia
Tel: (57-1)232-8452

Jose Ortega, President

Asociacion de Ganado Normando

Cra. 14 No. 86A-57
Bogota, Colombia
Tel. (57-1)256-6918, (57-1) 618-1679

2. Meat Importers**Frigogan**

Calle 1 No. 38-121
Apdo. 51911
Barranquilla, Colombia
Tel. (57-5)344-8495
FAX: (57-5)344-8495

Joaquin A. Palou, Gerente General

Frigorifico Guadalupe

Autopista Sur No. 66-78
Apdo. 13182
Bogota, Colombia
Tel. (57-1)710-4200
FAX: (57-1)710-1407

Frigopesca S.A

Bg de Calle 13 No. 1-25
Edif. Cond. Cartagena de Indias
Apdo. 2012
Cartagena, Colombia
Tel. (57-5)665-3793

Suizo

Calle 22 No. 129-41
Bogota, Colombia
Tel. (57-1)267-8800
FAX: (57-1)298-9094

Fernando de Francisco, President

Rica-Rondo

Calle 31 No. 2-80
Apdo. 4842
Cali, Colombia
Tel. (57-2)442-2637
FAX: (57-2)444-5969
E-mail: fdfrancisco@ricarondo.com.co

Humberto Medina, Gerente

ZENU

Cra. 64 No. 104-03
Apdo 3486
Medellin, Colombia
Tel. (57-4) 267-2501, 267-4167
Fax (57-4) 267-4170

Coolesar

Calle 44 No. 21-40
Apdo. 1084
Valledupar, Colombia
Tel. (57-5)72-2785

Frigosinu

Km 2 via Planeta Rica
Apdo. 1778
Monteria, Colombia
Tel. (57-4)83-4589

Coassar

Calle 46 Peatonal No. 33-18, of. 302
Tel. (57-7)647-9223
FAX: (57-7)643-6501
Bucaramanga

Agroandes

Km 27 via a Popayan
Tel. (57-2)553-9196
FAX: (57-2)553-9186
Cali

Jose M. Daccarett, Gerente
Frigorificos de la Costa
Cra. 44 No. 53-02
Barranquilla, Colombia
Tel. (57-5)841-0820
FAX: (57-5)841-7049

Hans Kohler/Maritza Koller
Koyomad S.A.
Cra. 39A No. 16-11
Bogota, Colombia
Tel. (57-1)368-4499

Nevin Herron-Avila, Gerente
C.I. Frigorificos Mar Azul Ltda.
Cra. 50 No. 32-144
Medellin, Colombia
Tel. (57-4)262-4614
FAX: (57-4)232-1435

Rogelio Armino-Salazar, Gerente
Institutional Food Service
Cra. 7 No. 180-75
Modulo 3 Codabas
Bogota, Colombia
Tel. (57-1)677-4040
FAX: (57-1)674-9290

Dianne Levy/ Randy Levy
**Distribuidora de Pescados y
Mariscos de la Sabana Ltda.**
Cra. 45A No. 80-80/56
Bogota, Colombia
Tel. (57-1)630-0011
FAX: (57-1)630-1154

Aida P. Torrijos
**ACINCA (Asociacion Colombiana de
Industriales de la Carne)**
Colombian Association of Meat Processors
Carrera 11 #73-44, Of. 503
Bogota, Colombia
Telefax: (57-1) 348-1228/317-7602/13
E-mail: acinca@latino.net.co

Ricardo Fonseca
General Manager
McKey Colombia S.A.
Cra. 126 No. 32-48, Int.3
Bogota, Colombia
Tel. (57-1)413-2573/61/49
FAX: (57-1)413-2536

Esteban Zarama-Pascualetto
Zarama Clarckson Ltda.
Av. 2A bis No. 31N-118
Cali, Colombia
Tel. (57-2)660-5374, 660-5375
FAX: (57-2)667-5408

Antonio Correa-Rincon
Distribuciones Corin, Ltda.
Tr. 24 No. 21D-61, Alto Bosque
Cartagena, Colombia
Tel. (57-5)662-3340, 624-6074
FAX: (57-5)662-3342

John Oswaldo Alvarez, Gerente
Abasto Carnico de Colombia Ltda.
Cra. 86 No. 32A-51
Bogota, Colombia
Tel. (57-1)413-2282
FAX: (57-1)413-2282

Enrique Uribe Leyva, Gerente
Frigorifico San Martin Ltda.
Av. Ciudad de Cali (Cra. 83) No. 17-51
Bogota, Colombia
Tel. (57-1)292-2243, 411-3676, 411-3617, 411-3637

Carlos Arturo Fuentes
Export International
Apdo. 89790
Diag. 24 No. 42B-95
Bogotá, Colombia
Tel. (57-1)337-9720, 337-8832
FAX: (57-1)337-9637
E.mail: exp_int@norma.net

Luis Alberto Leyva
Frigorifico Guadalupe
Autopista Sur No. 66-78
Bogota, Colombia
Tel. (57-1)711-2795

Eduardo Zuluaga, Owner
Frigorifico Catama Villavicencio
Cra. 64 No. 16-16
Bogota, Colombia
Tel. (57-1)205-6788

Juan Fernando Londoño, Director
Compras de Carne
CADENALCO
Calle 30A No. 65B-57
Medellin, Colombia
Tel. (574)355-9732
FAX: (574)235-6136
E-mail: cadenalco@cadenalco.com.co

Jesús Escovar
El Palacio de las Carnes
Calle 72 No. 23B-01 Barrio Cuba
Pereira, Colombia
Tel/FAX: (57-6)337-3559

TABLES**Colombia: Animal Numbers, Cattle****Production, Supply and Demand Table (1,000 head)**

| | | | | | | |
|-----------------------------|------------------------------|--------|--------|--------|-----|--------|
| PSD Table | | | | | | |
| Country: | | | | | | |
| Commodity: | Cattle, Animal Numbers | | | | | |
| | | 1,999 | | 2,000 | | 2,001 |
| | Old | New | Old | New | Old | New |
| Calendar Year Begin | | | | | | |
| Total Cattle Beg. Stks | 20,054 | 20,621 | 21,025 | 21,700 | 0 | 22,663 |
| Dairy Cows Beg. Stocks | 2,470 | 2,540 | 2,540 | 2,610 | 0 | 2,630 |
| Beef Cows Beg. Stocks | 7,160 | 7,210 | 7,160 | 7,290 | 0 | 7,305 |
| Production (Calf Crop) | 5,400 | 5,450 | 5,015 | 5,505 | 0 | 5,560 |
| Intra EC Imports | 0 | 0 | 0 | 0 | 0 | 0 |
| Other Imports | 10 | 12 | 10 | 8 | 0 | 15 |
| TOTAL Imports | 10 | 12 | 10 | 8 | 0 | 15 |
| TOTAL SUPPLY | 25,464 | 26,083 | 26,050 | 27,213 | 0 | 28,238 |
| Intra EC Exports | 0 | 0 | 0 | 0 | 0 | 0 |
| Other Exports | 80 | 10 | 80 | 20 | 0 | 140 |
| TOTAL Exports | 80 | 10 | 80 | 20 | 0 | 140 |
| Cow Slaughter | 1,450 | 1,450 | 1,500 | 1,530 | 0 | 1,576 |
| Calf Slaughter | 0 | 0 | 0 | 0 | 0 | 0 |
| Other Slaughter | 2,157 | 2,171 | 2,198 | 2,240 | 0 | 2,307 |
| Total Slaughter | 3,607 | 3,621 | 3,698 | 3,770 | 0 | 3,883 |
| Loss | 752 | 752 | 800 | 760 | 0 | 760 |
| Ending Inventories | 21,025 | 21,700 | 21,472 | 22,663 | 0 | 23,455 |
| TOTAL DISTRIBUTION | 25,464 | 26,083 | 26,050 | 27,213 | 0 | 28,238 |
| Calendar Yr. Imp. from U.S. | 0 | 0 | 0 | 0 | 0 | 0 |
| Calendar Yr. Exp. to U.S. | 0 | 0 | 0 | 0 | 0 | 0 |

Estimate: 1999.

Forecast: 2000.

Source: DANE (National Statistics Bureau) and FEDEGAN (National Cattle Growers Federation).

Colombia: Meat, Beef and Veal Production, Supply and Demand Table
(1,000 head and 1,000 tons)

| | | | | | | |
|-----------------------------|-------------------|---------|-------|---------|--------------------------------|---------|
| PSD Table | | | | | | |
| Country: | Colombia | | | 1,000 | <-Conversion factor for CWE | |
| Commodity: | Meat, Beef & Veal | | | | | |
| | | 1,999 | | 2,000 | | 2,001 |
| | Old | New | Old | New | Old | New |
| Calendar Year Begin | | 01/1999 | | 01/2000 | | 01/2001 |
| Slaughter (Reference) | 3,607 | 3,621 | 3,698 | 3,770 | 0 | 3,883 |
| Beginning Stocks | 23 | 23 | 24 | 23 | 0 | 17 |
| Production | 651 | 651 | 662 | 662 | 0 | 681 |
| Intra EC Imports | 0 | 0 | 0 | 0 | 0 | 0 |
| Other Imports | 3 | 3 | 4 | 3 | 0 | 4 |
| TOTAL Imports | 3 | 3 | 4 | 3 | 0 | 4 |
| TOTAL SUPPLY | 677 | 677 | 690 | 688 | 0 | 702 |
| Intra EC Exports | 0 | 0 | 0 | 0 | 0 | 0 |
| Other Exports | 1 | 2 | 4 | 2 | 0 | 3 |
| TOTAL Exports | 1 | 2 | 4 | 2 | 0 | 3 |
| Human Dom. Consumption | 652 | 652 | 667 | 669 | 0 | 683 |
| Other Use, Losses | 0 | 0 | 0 | 0 | 0 | 0 |
| TOTAL Dom. Consumption | 652 | 652 | 667 | 669 | 0 | 683 |
| Ending Stocks | 24 | 23 | 19 | 17 | 0 | 16 |
| TOTAL DISTRIBUTION | 677 | 677 | 690 | 688 | 0 | 702 |
| Calendar Yr. Imp. from U.S. | 0 | 0 | 0 | 0 | 0 | 0 |
| Calendar Yr. Exp. to U.S. | 0 | 0 | 0 | 0 | 0 | 0 |

Estimate: 1999.

Forecast: 2000.

Source: DANE (National Statistics Bureau) and FEDEGAN (Colombian Cattle Growers Federation).

Colombia: Cattle Prices (Colombian pesos per kilo)

| | | | | | |
|----------------------|--------|-----------|----------|--|--|
| Prices Table | | | | | |
| Country: | | | | | |
| Commodity: | Cattle | | | | |
| Year: | 2000 | | | | |
| | | | | | |
| Prices in (currency) | pesos | per (uom) | kilo | | |
| | | | | | |
| Year | 1999 | 2000 | % Change | | |
| Jan | 1,735 | 1,687 | -2.8% | | |
| Feb | 1,674 | 1,657 | -1.0% | | |
| Mar | 1,686 | 1,681 | -0.3% | | |
| Apr | 1,699 | 1,679 | -1.2% | | |
| May | 1,688 | 1,740 | 3.1% | | |
| Jun | 1,658 | 1,791 | 8.0% | | |
| Jul | 1,651 | 1,782 | 7.9% | | |
| Aug | 1,631 | 0 | -100.0% | | |
| Sep | 1,617 | 0 | -100.0% | | |
| Oct | 1,621 | 0 | -100.0% | | |
| Nov | 1,641 | 0 | -100.0% | | |
| Dec | 1,658 | 0 | -100.0% | | |

Average Monthly Prices for an Indicative Market: Medellín

Prices for live cattle for slaughter, grade 1a.

Exchange rate (Colombian pesos/US \$): 2,174.55 (8/01/00).

Colombia: Beef Prices (Colombian pesos per kilo)

| | | | |
|----------------------|------------------|------------------------|----------|
| Prices Table | | | |
| Country: | | | |
| Commodity: | Beef | | |
| Year: | 2000 | | |
| | | | |
| Prices in (currency) | pesos | per (uom) | kilo |
| | | | |
| Year | 1999 | 2000 | % Change |
| Jan | 9,700 | 10,100 | 4.1% |
| Feb | 10,500 | 10,080 | -4.0% |
| Mar | 10,550 | 9,932 | -5.9% |
| Apr | 10,000 | 9,950 | -0.5% |
| May | 9,580 | 10,393 | 8.5% |
| Jun | 9,700 | 10,927 | 12.6% |
| Jul | 9,750 | 10,444 | 7.1% |
| Aug | 9800 | 0 | -100.0% |
| Sep | 9500 | 0 | -100.0% |
| Oct | 9300 | 0 | -100.0% |
| Nov | 9525 | 0 | -100.0% |
| Dec | 9750 | 0 | -100.0% |
| | | | |
| Exchange Rate | 1,951 | (Local currency/US \$) | |
| Date of Quote | 14 February 1900 | (MM/DD/YY) | |

Peices for loin cut

Source: Supermarkets

Colombia: Cattle Exports, 1998-99 (Head)

| | | | | |
|---------------------|---------|----------------|----------------|------|
| Export Trade Matrix | | Animal Numbers | | |
| Country: | | | Units: | Head |
| Commodity: | | | Partial Begin: | Jan |
| | | | Partial End: | |
| Exports for | 1998 | 1999 | 1999 | 2000 |
| | Full | Full | Partial | Full |
| U.S. | | | | |
| Others | | | | |
| Venezuela | 139,740 | 6,391 | | |
| Brazil | | 31 | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| Total for Others | 139,740 | 6,422 | 0 | 0 |
| Others not listed | | | | |
| Grand Total | 139,740 | 6,422 | 0 | 0 |

Source: DANE (National Statistics Bureau)

Colombia: Cattle Imports, 1998-99 (Head)

| Import Trade Matrix | | Animal Numbers | | |
|---------------------|------------------------|----------------|----------------|------|
| Country: | | | Units: | Head |
| Commodity: | Cattle, Animal Numbers | | Partial Begin: | Jan |
| | | | Partial End: | |
| Imports for | 1998 | 1999 | 1999 | 2000 |
| | Full | Full | Partial | Full |
| U.S. | 383 | 751 | | |
| Others | | | | |
| Venezuela | 46 | | | |
| Brazil | 1,560 | 60 | | |
| Ecuador | 1,269 | | | |
| Canada | 167 | 83 | | |
| Spain | | 120 | | |
| Germany | 9 | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| Total for Others | 3,051 | 263 | 0 | 0 |
| Others not listed | | | | |
| Grand Total | 3,434 | 1,014 | 0 | 0 |

Source: DANE (National Statistics Bureau)

Colombia: Beef Exports, 1998-99 (Tons)

| | | | | |
|---------------------|-------|-------|----------------|--------|
| Export Trade Matrix | | Meat | | |
| Country: | | | Units: | MT CWE |
| Commodity: | | | Partial Begin: | Jan |
| | | | Partial End: | |
| Exports for | 1998 | 1999 | 1999 | 2000 |
| | Full | Full | Partial | Full |
| U.S. | | | | |
| Others | | | | |
| Venezuela | 2,462 | 658 | | |
| Dutch Antilles | 751 | 651 | | |
| Aruba | 139 | 250 | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| Total for Others | 3,352 | 1,559 | 0 | 0 |
| Others not listed | | | | |
| Grand Total | 3,352 | 1,559 | 0 | 0 |

Source: DANE (National Statistics Bureau)

Colombia: Beef Imports, 1998-99 (Tons)

| | | | | |
|---------------------|---------------------|-------|----------------|--------|
| Import Trade Matrix | | Meat | | |
| Country: | | | Units: | MT CWE |
| Commodity: | Meat, Beef and Veal | | Partial Begin: | Jan |
| | | | Partial End: | |
| Imports for | 1998 | 1999 | 1999 | 2000 |
| | Full | Full | Partial | Full |
| U.S. | 840 | 1,048 | | |
| Others | | | | |
| Costa Rica | 475 | | | |
| Panama | 2,540 | 1,153 | | |
| Venezuela | | | | |
| Argentina | 76 | 611 | | |
| Canada | | 38 | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| Total for Others | 3,091 | 1,802 | 0 | 0 |
| Others not listed | 20 | 1 | | |
| Grand Total | 3,951 | 2,851 | 0 | 0 |

Source: DANE (National Statistics Bureau)